



ADAPTATION STRATEGIES FOR CULTURE AND CREATIVE INDUSTRIES DURING THE RUSSO-UKRAINIAN WAR

Wave 1

ANALYTICAL REPORT

ON THE RESULTS OF THE UCF'S RESEARCH FINDINGS

UKRAINIAN
CULTURAL
FOUNDATION

INTRODUCTION

Russia's full-scale military aggression has caused significant damage to all aspects of Ukrainian society life. The country's culture and creative industries have suffered serious losses. We already know about hundreds of destroyed historical and cultural heritage sites, looted archival and museum collections. Thousands of cultural and artistic workers have been forced to stop working, and some have been killed in the war. But despite all the destructive factors affecting Ukrainian culture, the work continues, and a significant number of cultural figures and institutions have found ways and resources to continue their professional activities. The cultural sphere has demonstrated sustainability and is a very promising field for preparing and supporting Ukraine's post-war reconstruction. Accordingly, the factors that contributed to the adaptation to the crisis conditions require comprehensive and detailed consideration. At the same time, it is worth paying attention to the reasons that prevented Ukrainian artists and institutions from adapting to war conditions. The analysis of this topic has an important practical value, as it can show the achievements and problems of Ukrainian culture and serve as a source for a future strategy for the recovery of Ukrainian culture and the post-war reconstruction of Ukraine.

Objectives of the survey:

- reveal the main factors of adaptation to the conditions of war in the Ukrainian cultural sphere;
- to find out the key conditions for successful adaptation;
- to identify active figures, institutions, organizations that can contribute to the development of a post-war recovery strategy;
- to formulate promising scenarios for the post-war restoration of Ukrainian culture;
- to launch work on the key theses of the strategy for the post-war restoration of Ukrainian culture.

Data collection method: online questionnaire.

Sample population: 638 respondents (creative entrepreneurs and creative professionals - applicants, UCF grantees, experts and Ministry of Culture and Information Policy of Ukraine staff). The margin of error (standard error) for the entire sample is $\pm 3\%$.

Time frame of the survey: data collection was carried out from 11/01/2022 to 11/18/2022.

EVALUATION OF THE STATE OF THE CULTURAL SPHERE IN UKRAINE

The results of the survey demonstrate that more than half of the polled representatives of the Ukrainian cultural sphere and creative industries define the general state of culture as good – 5.5% or acceptable – 49.8% (Diagram 1). At the same time, there is a significant percentage of those who define the state of culture as bad (44.7%). The current state of culture is mostly described as bad by self-employed people (64%), whose activities have declined the most among other categories of Ukrainian cultural and creative industries workers.

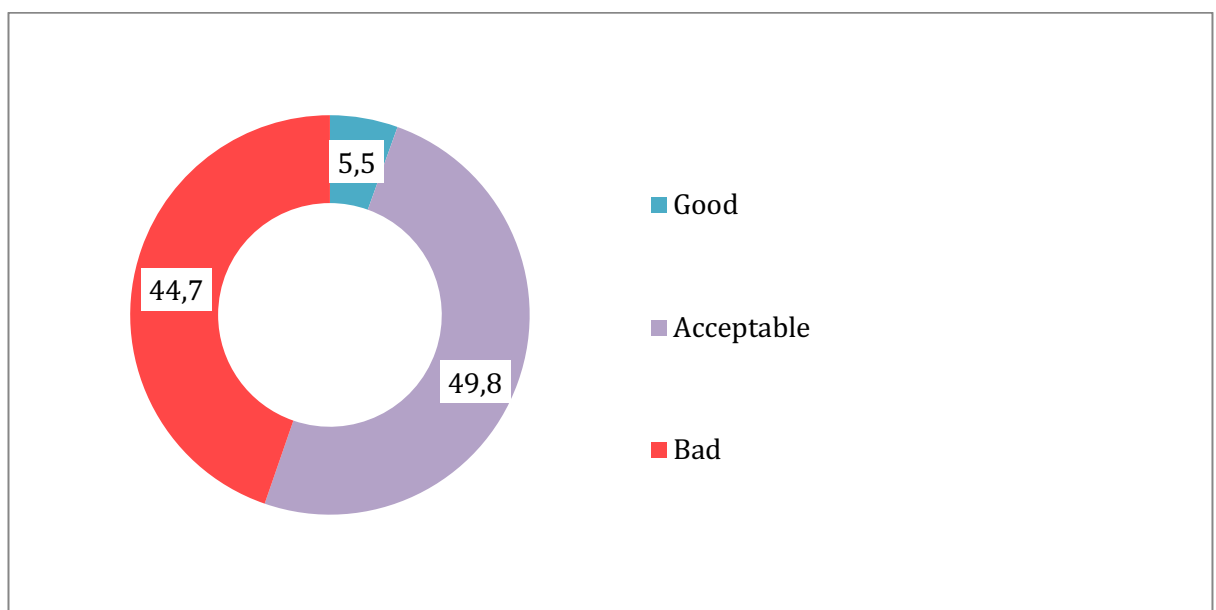


Diagram 1 - How do you evaluate the general state of the cultural sphere and creative industries today?, %

According to the respondents, the main obstacles to the development of Ukrainian culture, apart from the war, are the lack of regular state financial support – 73.4% and low payment and demotivation of cultural workers – 63.8% (Diagram 2). The first problem is most significant for employees of non-governmental organizations and representatives of the audiovisual art, literature and publishing, and creative industries. The second one is more important for employees of state-funded organizations and cultural workers in the visual and audiovisual art.

Financial problems are also aggravated by other obstacles to the development of culture, among which respondents mentioned the following: a lack of qualified

specialists, poor information support for cultural events, and a decrease in the number of accessible forms of cultural leisure for the population.

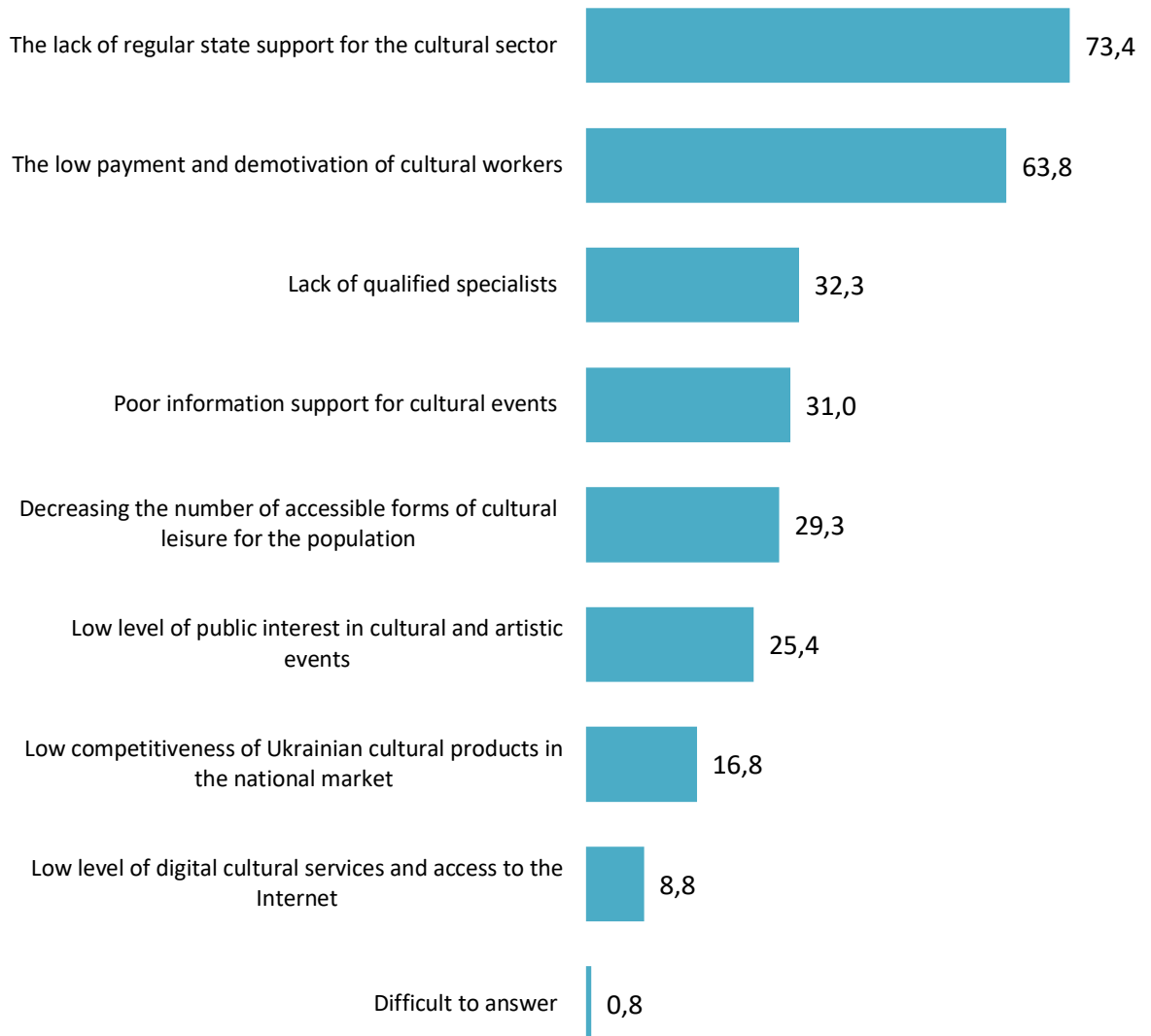


Diagram 2 - In your opinion, what is the biggest obstacle to the development of Ukrainian culture besides the war?, %

OCCUPATION OF RESPONDENTS

Despite the difficult conditions, the majority of respondents continue to work (about 90%). In particular, 74.9% of respondents work in the cultural sphere, and 14.6% have changed their field. Temporarily unemployed are 10.5% of respondents (Diagram 3).

Representatives of state/municipal organizations have the most stable employment situation – 7% of them are temporarily unemployed. At the same time, this indicator is twice as high among representatives of non-governmental organizations and individual entrepreneurs, which indicates that these categories are more vulnerable in a crisis. Despite the absence of a critical employment situation in any sector of the creative industries, about 20% of representatives of literature and publishing, as well as visual art, are currently unemployed.

The highest rate of those who continued to work is among representatives of the performing and stage art (96.1%) and cultural heritage (93.2%) sectors. In addition, respondents who did not change their place of residence after February 24 (93.2%) mostly continue to work, including 79.1% who continue to work in the cultural sphere. The largest number of those who do not work is among respondents who now live abroad – 22%. Although two-thirds of the respondents in this group still work in the cultural sector, it is most likely that they work remotely.



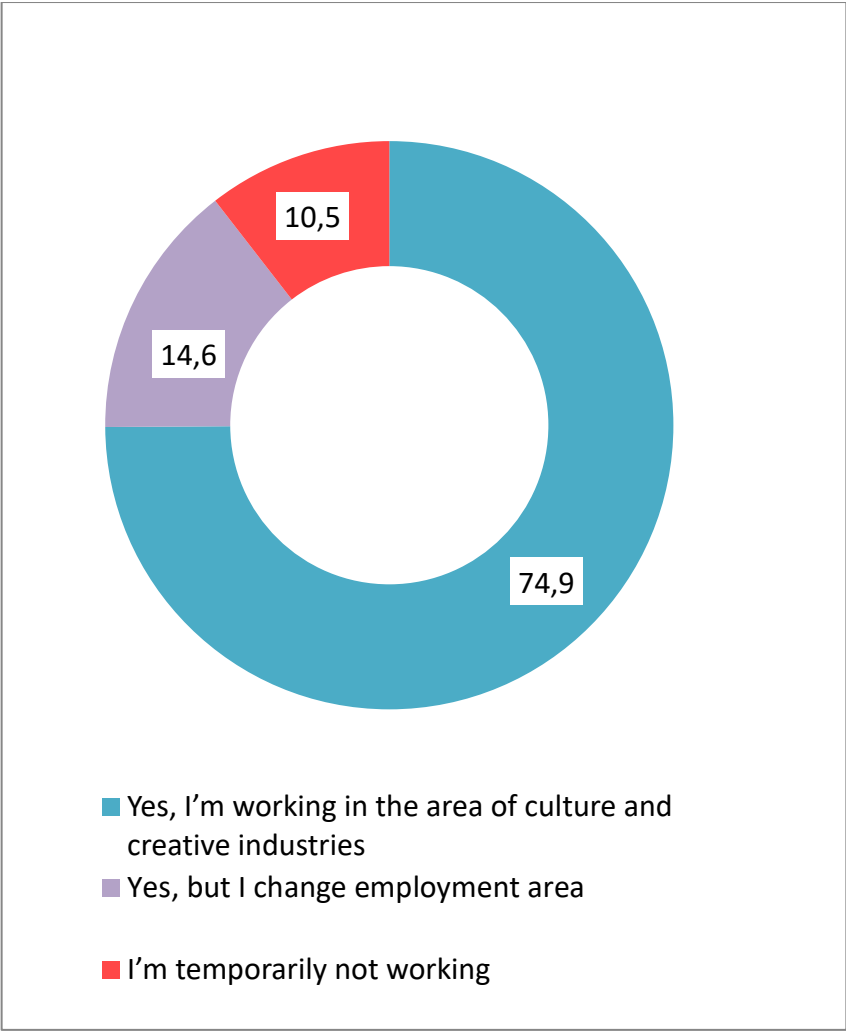


Diagram 3 - Are you currently working?, %, N=638

THE SITUATION OF THE ORGANIZATION IN THE CONTEXT OF WAR

Despite the difficulties of the war, approximately half of the respondents are generally optimistic about the situation in their organizations today. On the other hand, – more than a third of respondents said that the situation in their organizations is generally bad (Diagram 4). There is a clear trend in the assessment of the state of affairs in the organization: if the respondent evaluates the situation in the organization negatively, he/she transfers the same assessment to the general state of culture in Ukraine. A similar situation can be seen in the opposite direction: if the situation in the organization is rated positively, the overall state of culture – is also positive.

The situation in the organization is more positively evaluated by representatives of the literature and publishing, cultural heritage, and cultural and creative industries sectors – from 56 to 63%. On the other hand, the negative evaluation is higher in the sectors of performing and stage art, audiovisual art, and visual art – from 41 to 46%. Employees of state/municipal institutions and non-governmental organizations are more positive about the state of affairs – more than half in total. On the other hand, 53.1% of the interviewed individual entrepreneurs said that the situation in the organization is rather negative.

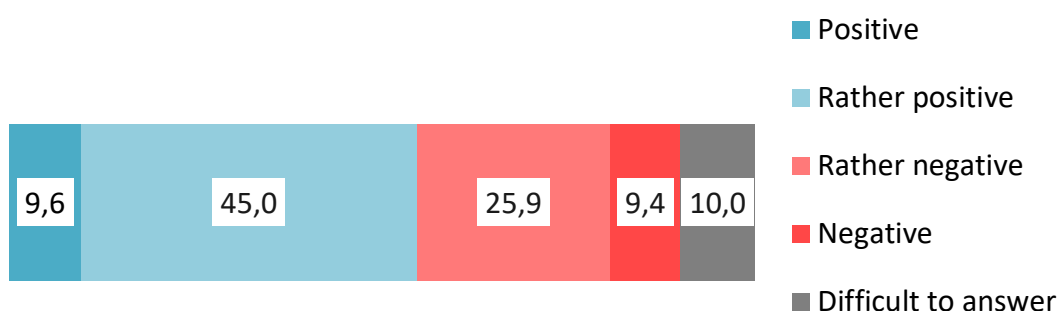


Diagram 4 – How would you generally rate the situation in your organization today?, % (among respondents who continue to work in the sphere of culture and creative industries, N=478)

The questionnaire shows that organizations in the cultural and creative industries have generally adapted to operating during the war – 79.7%. Even though the full-scale

war has been going on for more than 9 months, the number of unadapted institutions remains significant and amounts to 14.7% (Diagram 5).

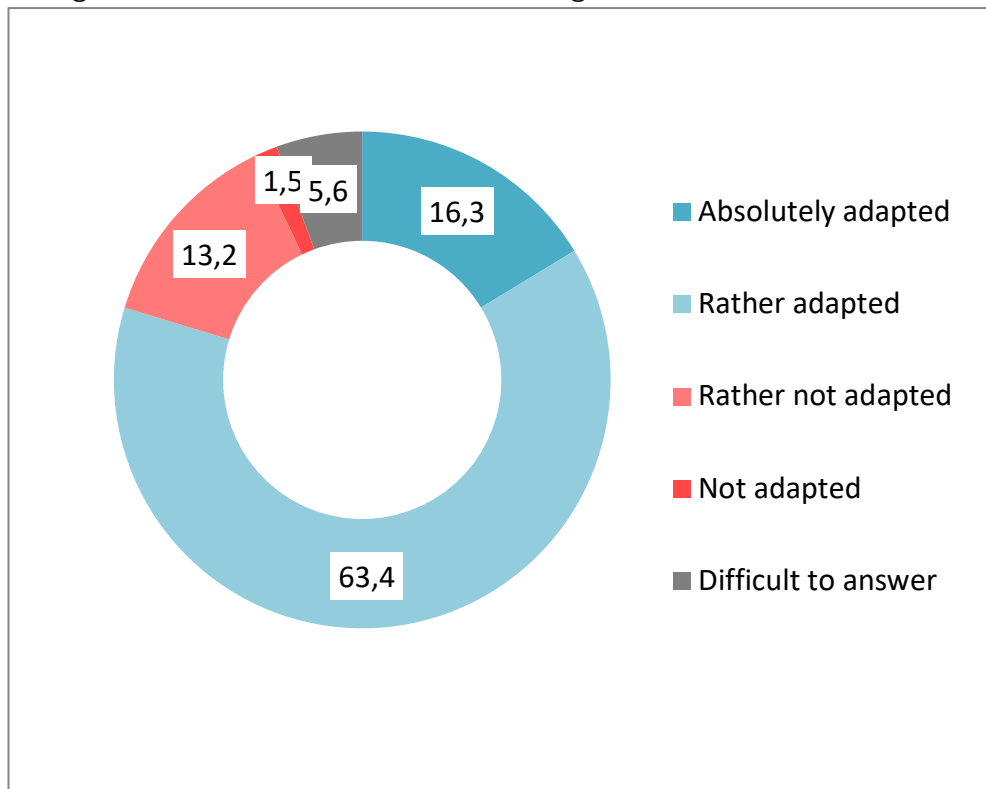


Diagram 5 – How well has your organization adapted to the war?, % (among respondents who continue to work in the sphere of culture and creative industries, N=478)

To demonstrate the groups of high and low levels of adaptability was built the index of adaptation, which is calculated in points as the difference between positive and negative ratings. The index value can range from – 100 to 100 points. The higher the index value, the more adaptable the organization is.

The analysis of the questionnaire results shows that the adaptability index is quite high and amounts to 65 points. According to the sectoral ranking, the sectors most adapted to the conditions of war are cultural heritage and cultural and creative industries. This group also includes state and municipal organizations that invariably continue to operate after February 24, 2022.

In contrast, representatives of the visual, performing and stage art sectors demonstrated lower rates of adaptation. In addition, the results of the survey indicate that the most vulnerable position among cultural and creative industries workers is occupied by those who work as individual entrepreneurs, and a significant limiting factor for adaptation is moving abroad or within Ukraine (Diagram 6).

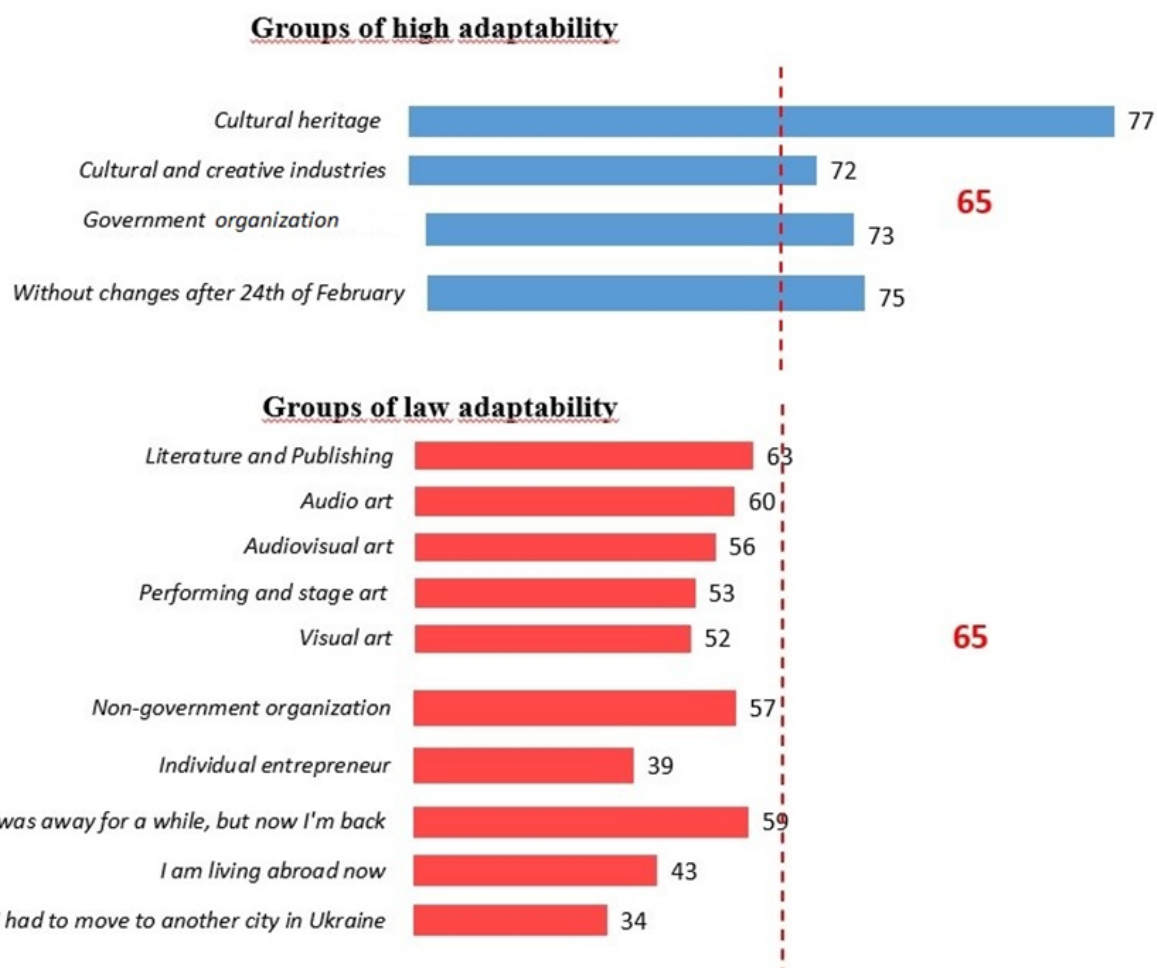


Diagram 6 - Groups of high and low levels of adaptability, in points (among respondents who continue to work in the sphere of culture and creative industries, N=478)

The main measures taken by cultural institutions to support their activities during the war are identified as key factors that contribute to adaptation to the war conditions. Among them, the highest rates are: optimization of expenses - 65.7%, applying for grants, scholarships, etc. to international organizations - 63.2% and creation of new products/services - 58.4% (Diagram 7).

The main strategy for surviving a crisis can be described as reducing expenses while maintaining operations, creating new products and services, and taking active steps to attract additional sources of funding (grants, scholarships, etc.).



Diagram 7 - Which measures have been taken to support the activities of your organization during the war? % (among respondents who continue to work in the sphere of culture and creative industries, N=478)

Using the previous diagram, we built a motivational matrix of adaptation that shows the difference between adapted and non-adapted respondents, contrasting the successful and unsuccessful adaptation strategies (Diagram 8).

"Motivational core" - goals with a great difference and high value significantly define the organization's adaptability to wartime activities.

"Peripheral motives" – motives with a large difference, but not high significance, which differentiate certain social groups and operate in certain situations.

"Distinct but not differentiating motives" – motives with high importance but low difference.

"Insignificant motives" are motives with low importance and low difference. The motivational matrix shows that the core of the strategy for successful adaptation to the conditions of war is the creation of new cultural products while optimizing costs.

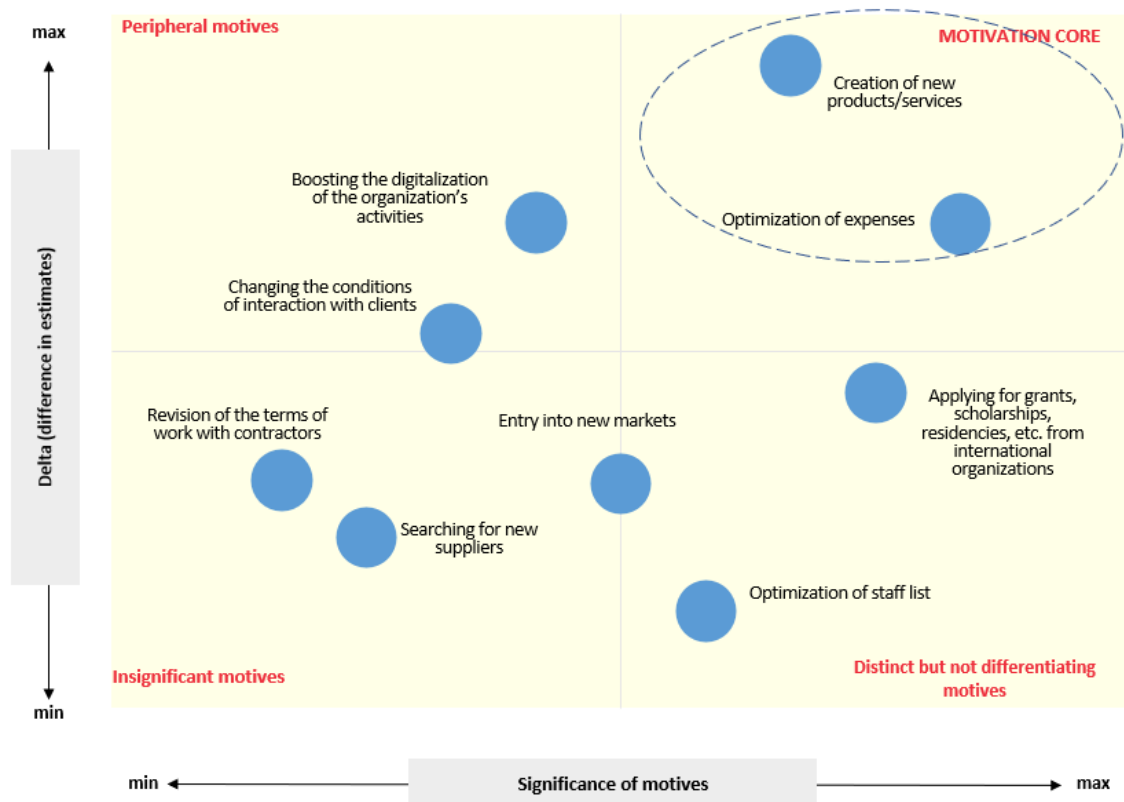


Diagram 8 - Motivational matrix of adaptation (among respondents who continue to work in the sphere of culture and creative industries, N=478)

At the same time, respondents named key factors that obstruct their organizations from adapting to the war. Two main reasons were identified: the uncertain situation in Ukraine in general (73.4%) and the lack of funding (73%) (Diagram 9). If the first factor is an obvious consequence of the war, then problems with funding are a traditional obstacle to the development of the sphere, which has now become significantly more intense and further limits the amount of funds available in the cultural sphere.

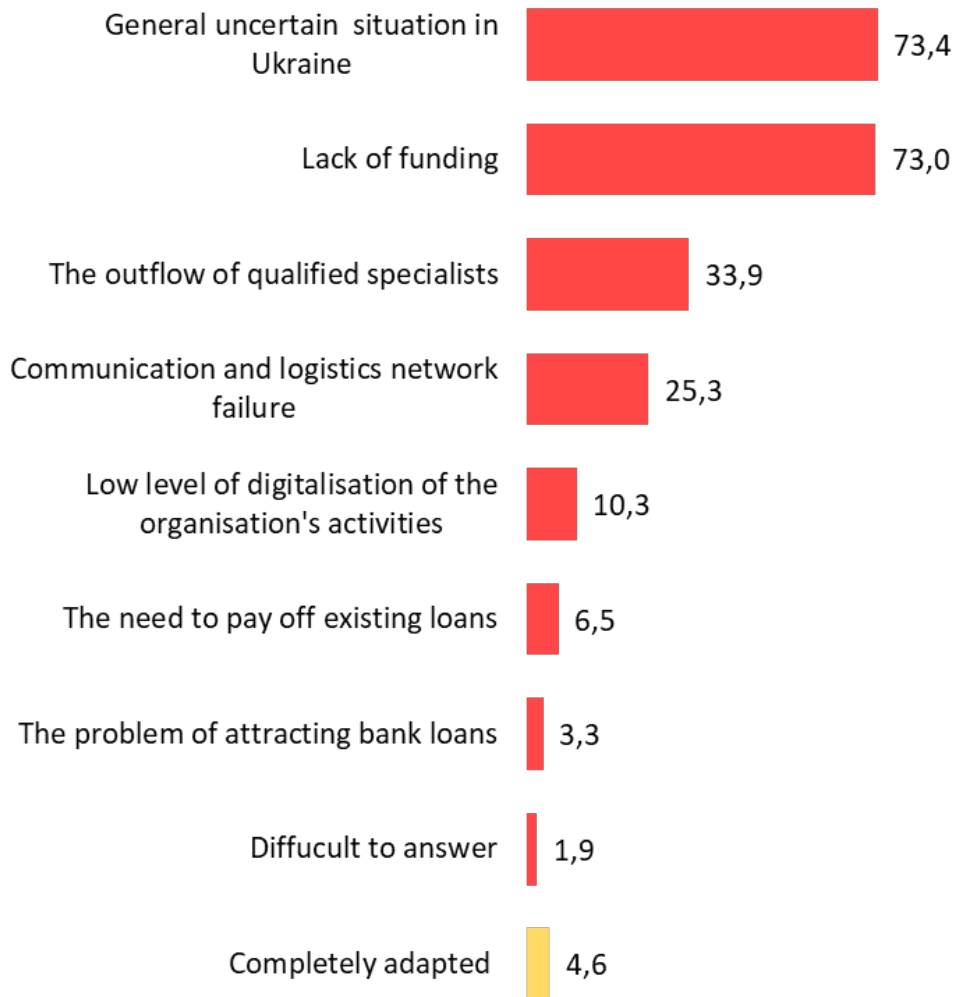


Diagram 9 - What is the biggest obstacle for your institution to adapt to work during the war? (among respondents who continue to work in the sphere of culture and creative industries, N=478)

The generated matrix of demotivating factors for cultural organizations and creative industries shows that the main and determining factor of non-adaptation in the current situation is the lack of funding (Diagram 10). This indicates that the war has further exacerbated the chronic problem of the cultural sphere in Ukraine and is the main obstacle for institutions and professionals to continue their professional activities.

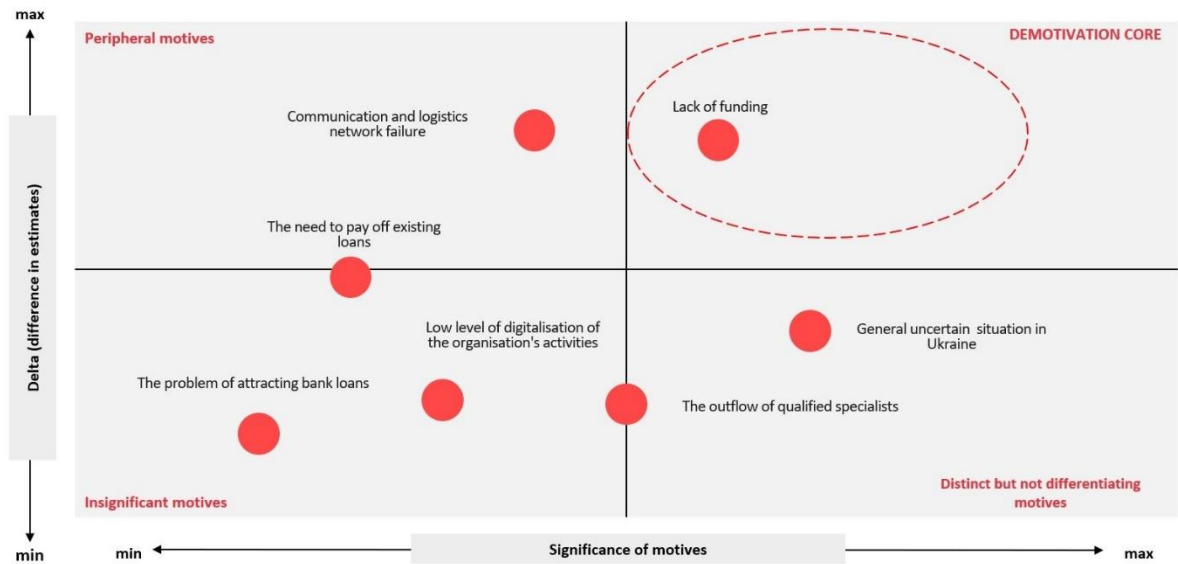


Diagram 10 - Demotivational matrix of adaptability (among respondents who continue to work in the sphere of culture and creative industries, N=478)

Almost the same number of respondents rated the situation in their organization in the second half of 2022 as getting worse (34.5%) or unchanged (34.3%) compared to the year's first half. For 22.8% of respondents, the situation has improved (Diagram 11). This allows us to claim that in the current conditions of war, half of the organizations whose representatives took part in the survey managed to stabilize the situation in their institutions or even improve some conditions.

Most likely, the organizations that have been able to adapt best and retain the ability to work systematically will become an important element in the process of rebuilding the cultural sector in the future.

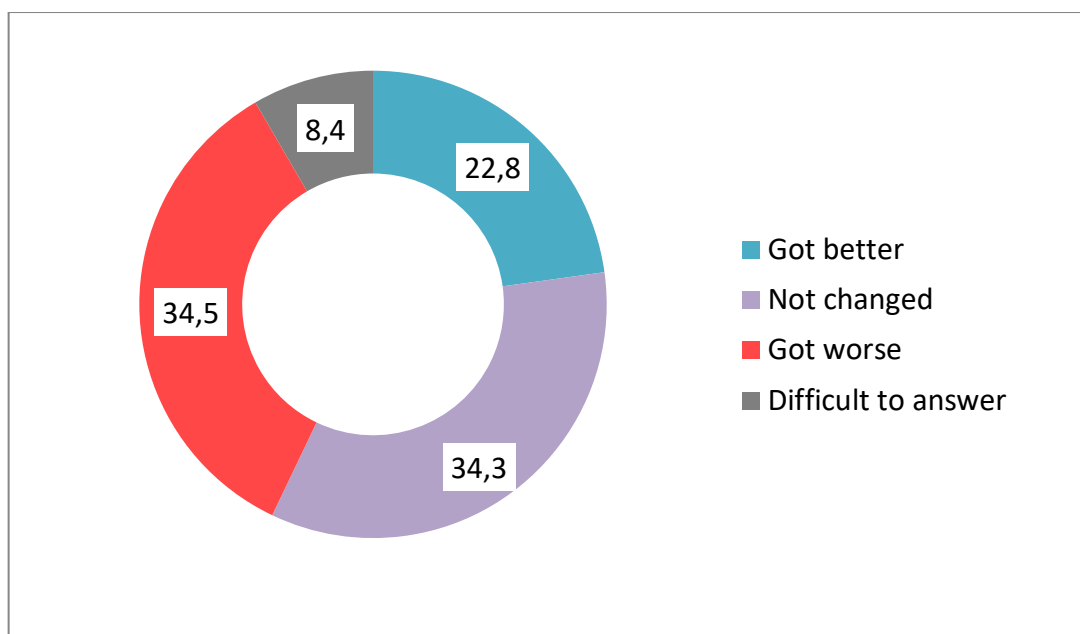


Diagram 11 - How has the general situation of your organization changed in the second half of 2022 compared to the first half of 2022? (among respondents who continue to work in the sphere of culture and creative industries, N=478)

According to the questionnaire, a significant number of organizations in the cultural and creative industries still do not have a crisis plan (21.1%). At the same time, 46% of respondents said that their organization has such a plan, and another 25.5% said that the plan is in the process of being developed (Diagram 12). Thus, about half of the organizations have not yet developed a crisis plan despite the difficult and uncertain situation.

At the same time, the existence of a crisis plan affects the level of adaptation to war conditions. Among those organizations that have a such plan, 88.2% are generally adapted, and among those that do not have a plan - 64.2%.

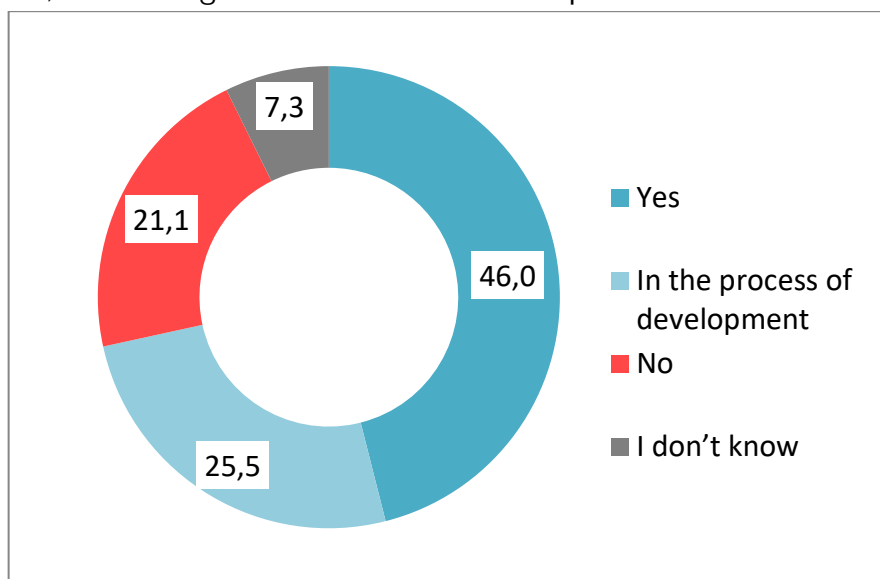


Diagram 12 - Has your organization elaborated a crisis plan since the beginning of the war? (among respondents who continue to work in the sphere of culture and creative industries, N=478)

THE SUPPORT OF CULTURE DURING THE WAR

The results of the survey show that respondents generally have a negative evaluation of the level of support received by the cultural sector during the war. In the opinion of the respondents, the most significant support for the cultural sector during the war was provided by international organizations, volunteers, and NGOs - 43.6%, 31.2%, and 27%. The least significant, according to respondents, was support from business and state institutions. Overall, 72.5% to 78.3% of respondents said it was insignificant (Diagram 13).

Representatives of the visual art, cultural heritage, and performing and scenic art sectors felt the most support from international organizations in the cultural sphere during the war, while the support from volunteers was most appreciated in the literature and publishing sector. The least satisfied with business support are representatives of the audio and audiovisual art (Diagram 14).

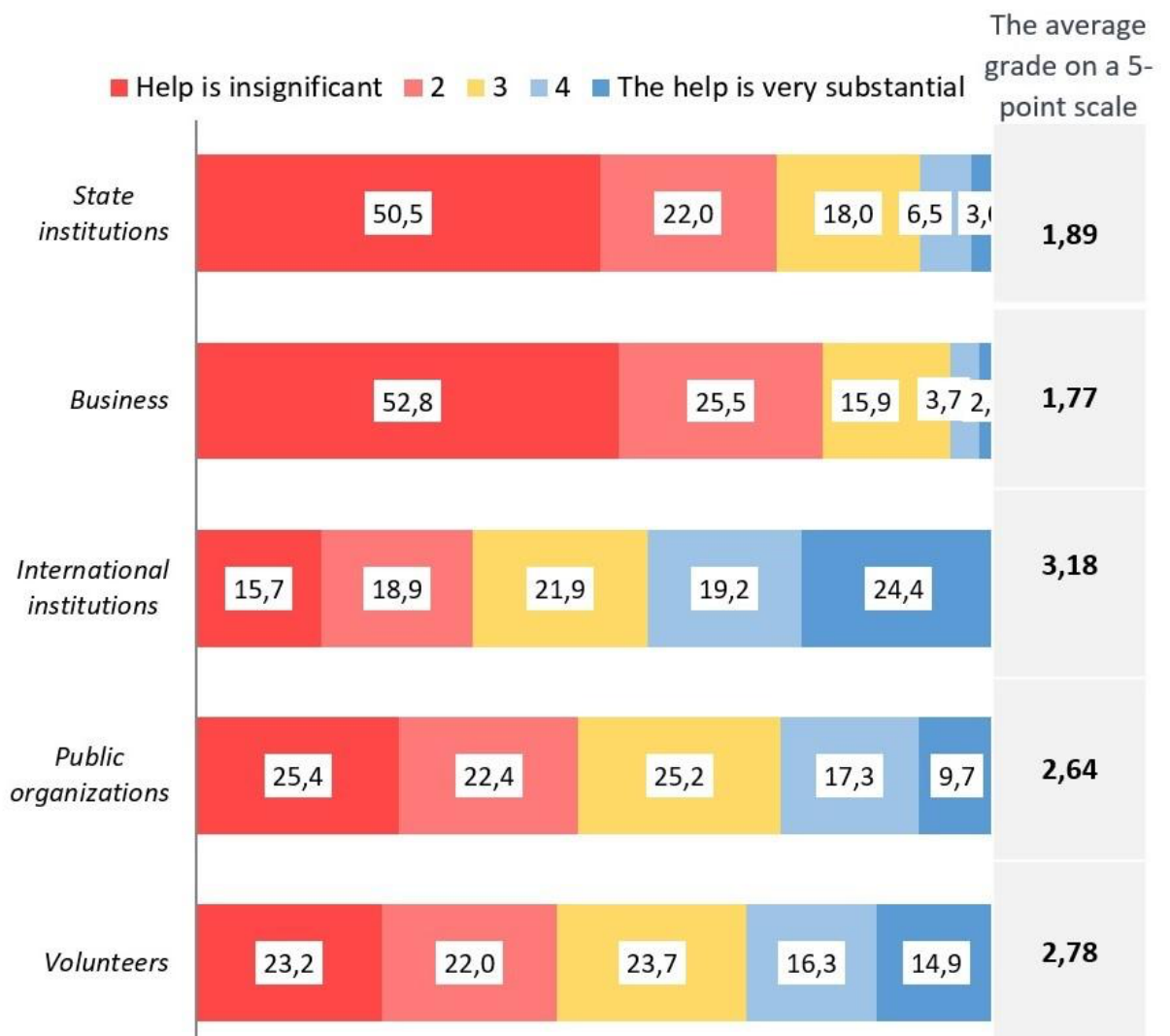


Diagram 13 - How would you rate the support for culture and creative industries during the war from:, % N=638

	Visual art	Audio art	Audiovisual art	Littrature and publishing	Performing and stage art	Cultural heritage	Cultural and creative industries
State institutions	2,15	2,13	1,91	2,13	2,22	2,01	2,34
Business	2,17	1,57	1,89	2,20	2,18	2,04	2,21
International institutions	3,65	3,20	3,36	3,05	3,46	3,56	3,15
Public organizations	2,78	3,07	2,51	2,75	2,96	3,08	2,89
Volunteers	2,89	2,83	2,77	3,42	3,11	3,20	3,05

Diagram 14 - Evaluation of support for the culture by sector (average score on a 5-point scale, N=638)

In addition to the opinion that the assistance from state institutions was insignificant, 21.5% of respondents indicated that their organizations received information support from state, regional and local authorities. For 21.1% of respondents, salaries were compensated, and 16.1% had access to educational programs, trainings, and consultations. Obviously, the negative opinion of the level of assistance from state institutions is overestimated due to high expectations of the effectiveness of state institutions in the war. This is probably why 33.1% of respondents said that state, regional or local authorities did not provide any assistance during the war (Diagram 15).

On the other hand, those organizations that took advantage of at least one of the opportunities for support from state institutions demonstrated a significantly higher level of adaptation in comparison to those that did not use it at all - 84.2% vs. 71.3%.

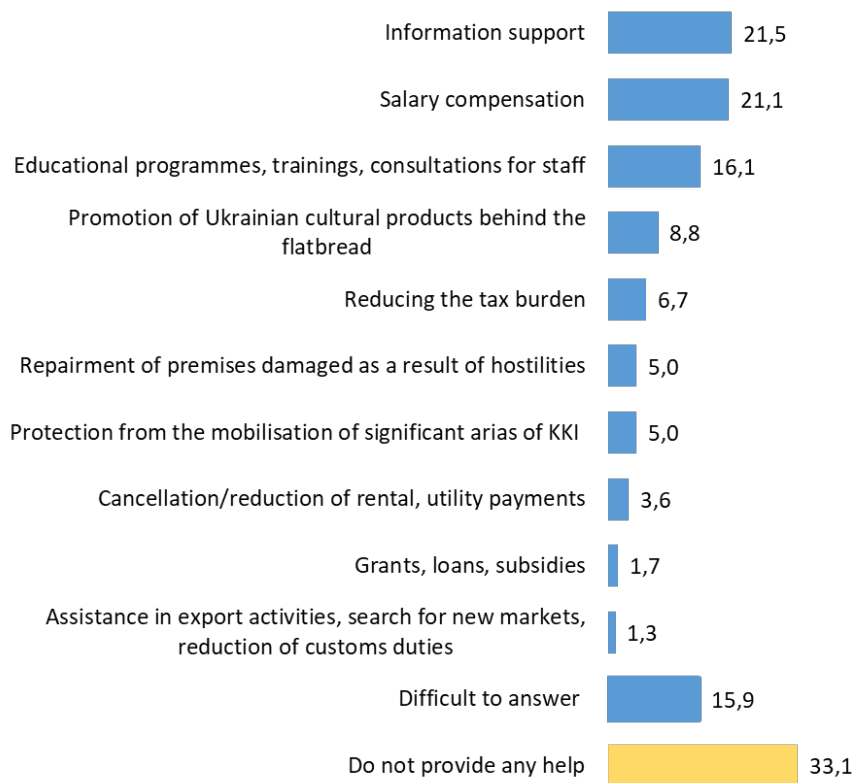


Diagram 15 - What kind of support is provided to your organization by state, regional and local authorities during the war? (among respondents who continue to work in the sphere of culture and creative industries, N=478)

EVALUATION OF THE ORGANIZATION'S PERSPECTIVES

Concerning the organization's perspectives, almost half of the respondents believe that the situation will not change significantly. At the same time, more than 20% plan to expand their activities. At the same time, 19% of respondents are currently unable to answer the question about the organization's prospects clearly (Diagram 16).

As a result, it can be said that a significant number of cultural institutions have been able to transform their activities to war, and a significant group expects positive changes in the future.

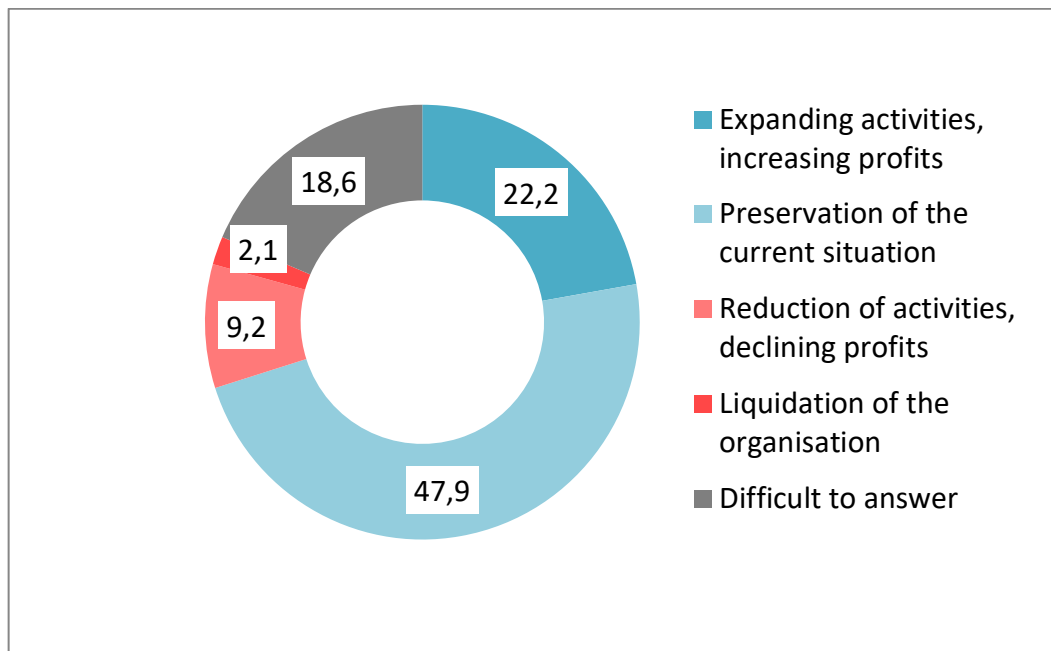


Diagram 16 - How do you generally rate the perspectives of your organization?

One of the key measures for adaptation to the new challenges of the war is to reduce costs and the number of employees. Only 12.1% of respondents mentioned closing the organization. At the same time, a significant group – 24.3% cannot answer this question (Diagram 17). It is obvious that among the adapted organizations, the percentage of those who consider closure as a crisis measure in the face of deteriorating situation is much lower (7.3%). Instead, among non-adapted organizations, this option has been chosen by almost a third of respondents.

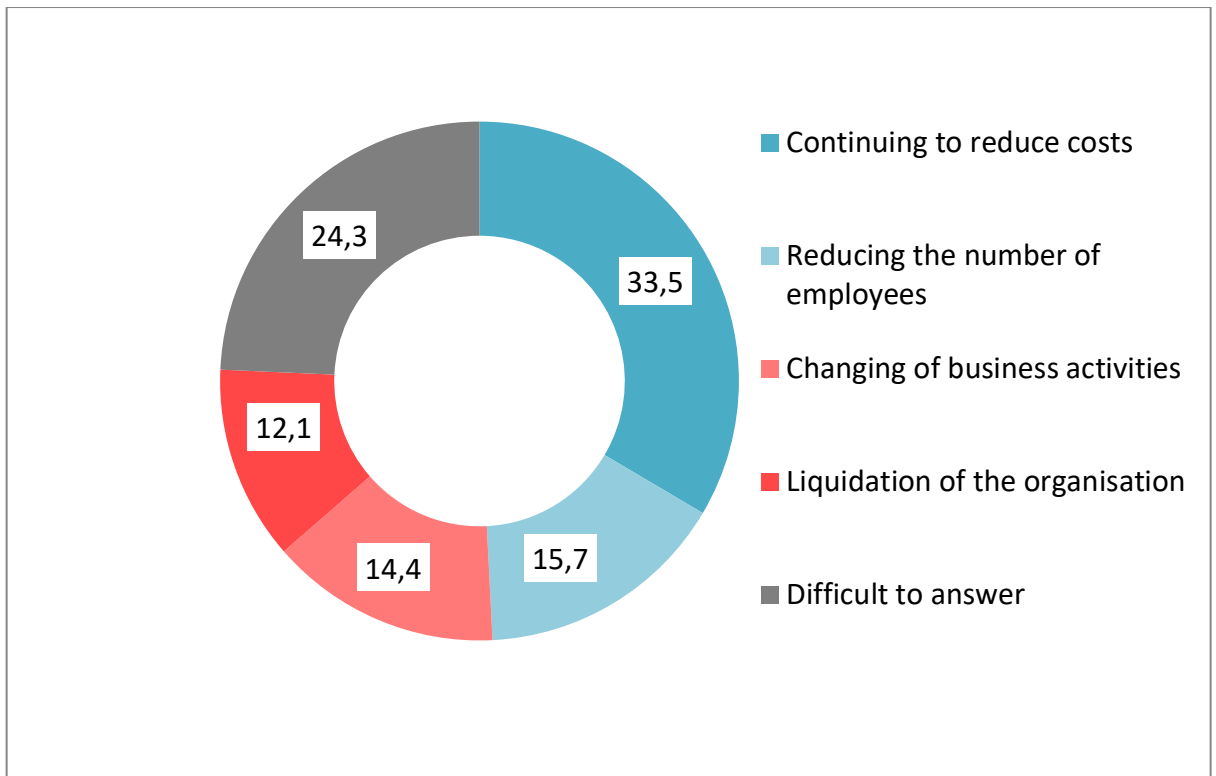


Diagram 17 - In your opinion, which measures can your organization take in case the situation is getting worse? % (among respondents who continue to work in the sphere of culture and creative industries, N=478)

THE POST-WAR RESTORATION OF CULTURE

Overall, respondents evaluate the post-war development of culture and creative industries positively. A rapid recovery is predicted by 29.8% of respondents, and a slow recovery by 55.3% (Diagram 18).

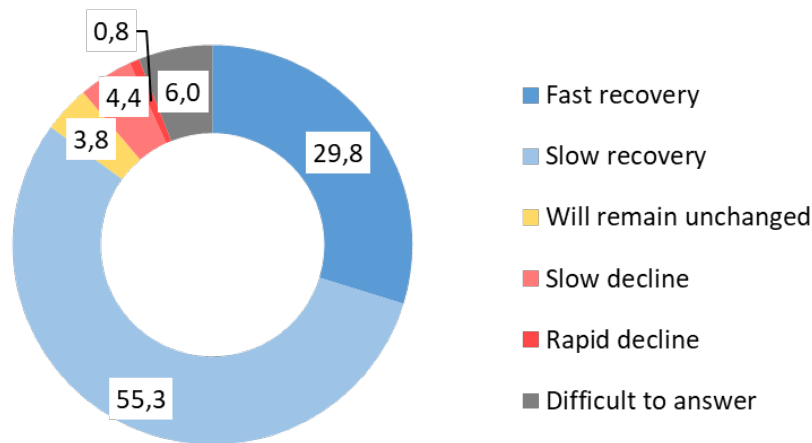


Diagram 18 - In your opinion, how will the cultural and creative industries evolve after the war?

The majority of respondents are ready to join the implementation of projects to rebuild Ukraine's cultural sector. Overall, 95% of respondents said yes (Diagram 19). All this shows that cultural representatives are sufficiently motivated to actively engage in post-war reconstruction and that almost half of the respondents are ready to take up reconstruction under any conditions.

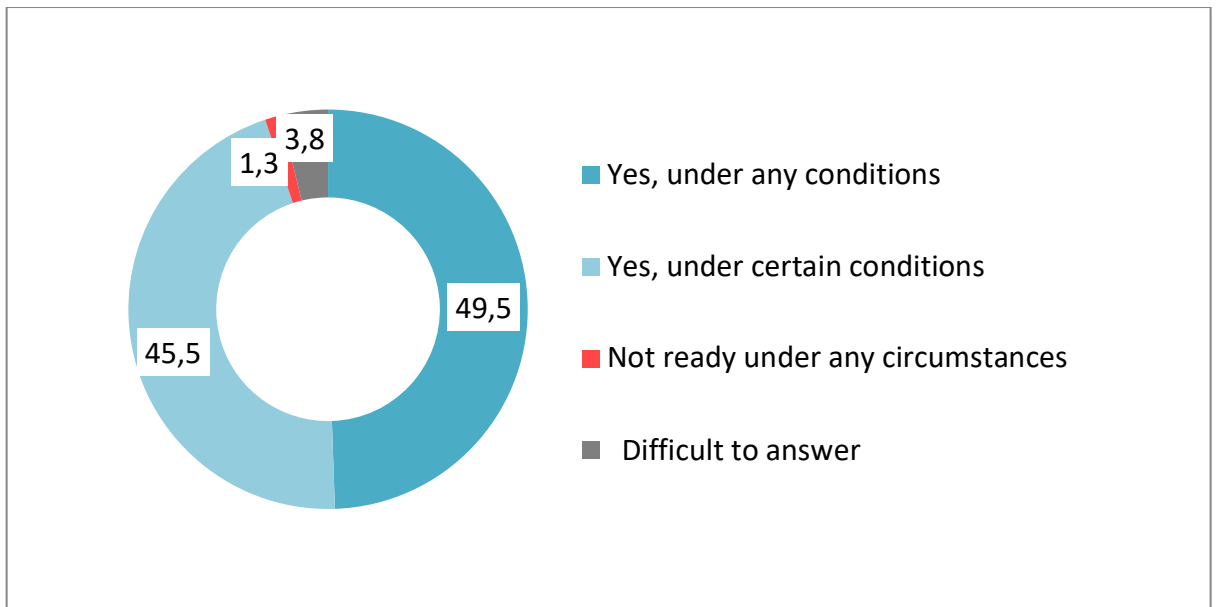


Diagram 19 - Are you ready to join projects aimed at rebuilding the cultural sphere of Ukraine?

Regarding the allocation of funds for cultural development in the areas/regions that were destroyed as a result of the war, respondents were almost unanimous in their opinion that a separate program should be created for these areas - 80.7% (Diagram 20).

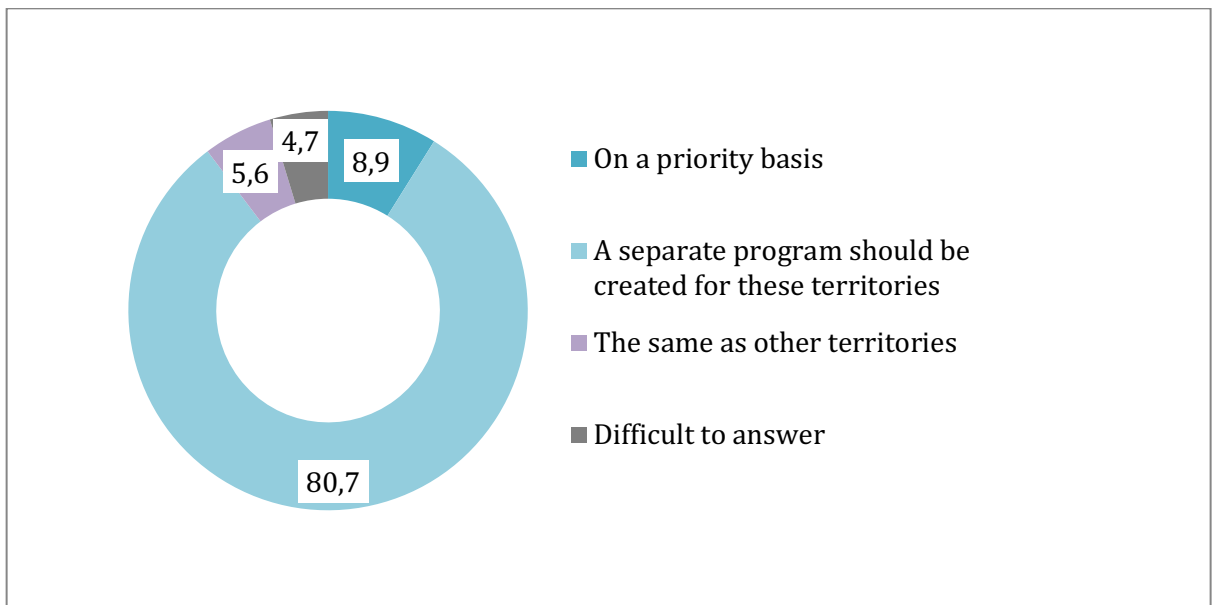


Diagram 20 - How funds for cultural development in the areas/regions that were destroyed as a result of the war should be distributed?

Furthermore, respondents indicated that the main trends relevant during the reconstruction will be: increasing demand for Ukrainian cultural products in Ukraine and abroad (74.7%), restoration of damaged cultural heritage objects (61.5%), preservation

of national memory and memorialization of defenders (50%). At the same time, the respondents did not ignore the issue of finding new sources of funding, as this trend was chosen by 39.9% of respondents (Diagram 21).

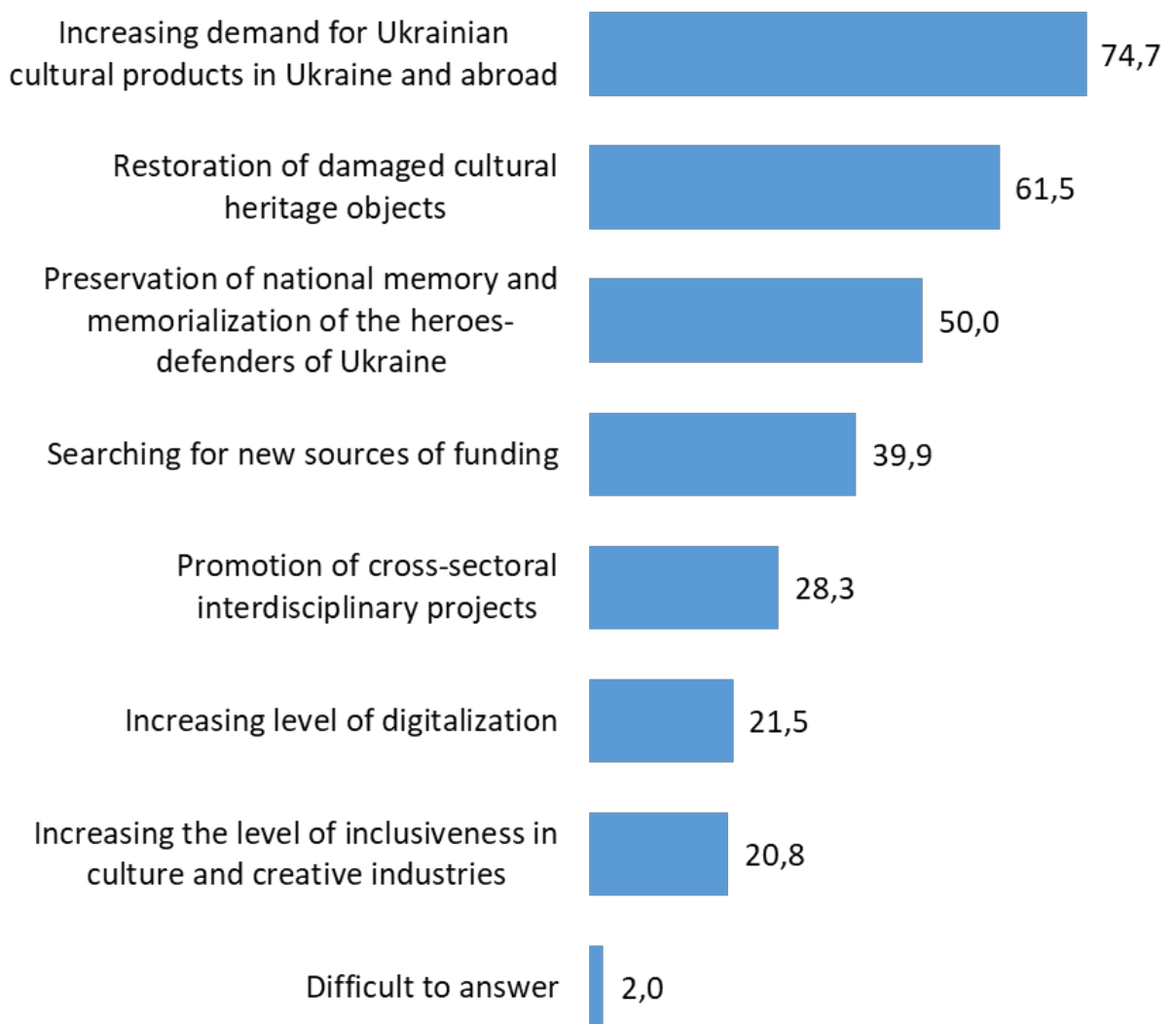


Diagram 21- What are the key trends in culture and creative industries that are relevant during the reconstruction?

Traditionally, respondents named grants for projects as the main means of support for cultural organizations and artists. And it should be noted here that compared to the previous UCF survey (June 2022), this percentage has increased. A significant number of respondents also noted that the state strategy for the restoration and development of culture and creative industries is an important element of post-war reconstruction, so is the promotion of Ukrainian cultural products abroad. Compared to the previous UCF survey (June 2022), the demand for grants/vouchers for business development has slightly decreased (Diagram 22).

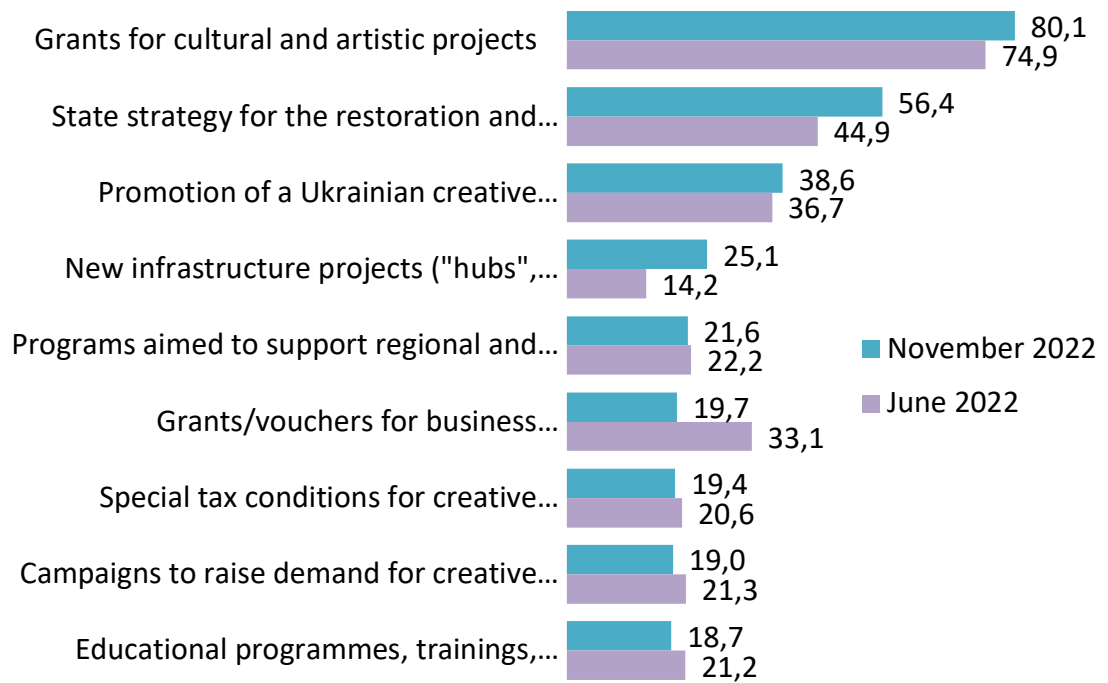


Diagram 22 - In your opinion, which measures from the state and donors could help the cultural sector in post-war reconstruction the most?

PROFILE OF THE RESPONDENTS

The profile of the respondents shows that women were more active in the survey (almost two-thirds of the respondents). The majority of respondents (over 80%) are between the ages of 25 and 54. More than 60% of them have not changed their place of residence since February 24 and mostly work in a mixed format. About half of the respondents are representatives of state/municipal organizations. Most of the responses came from employees of the cultural heritage, cultural and creative industries, and audiovisual art sectors (Diagrams 23-28).

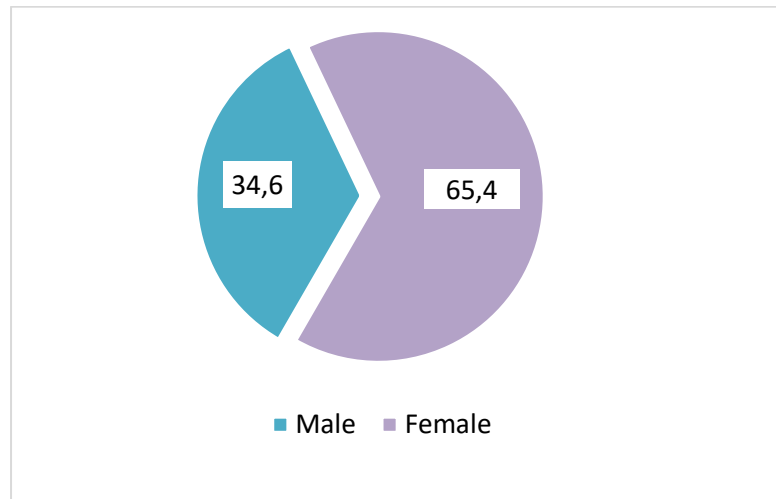


Diagram 23 - Gender, %, N=638

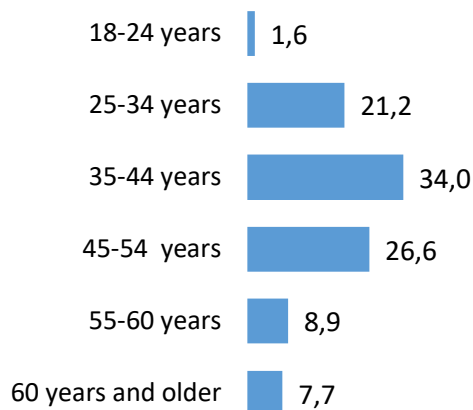


Diagram 24 - Age, % N =638

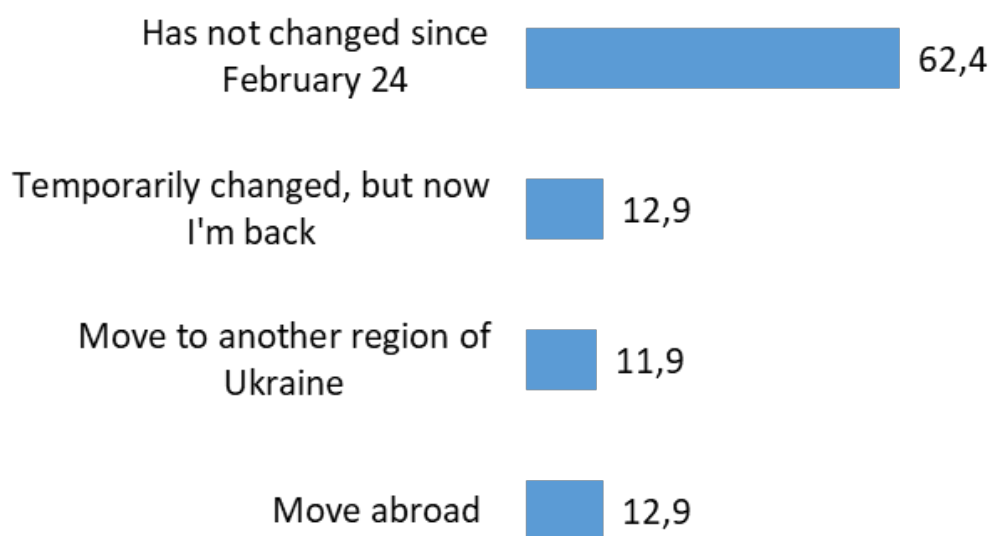


Diagram 25 - Place of residence, %, N=638

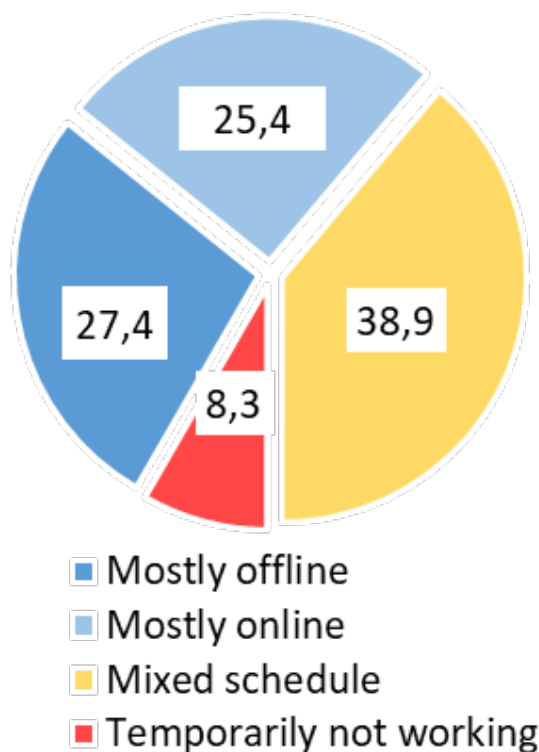


Diagram 26 - Format of work, %, N=638

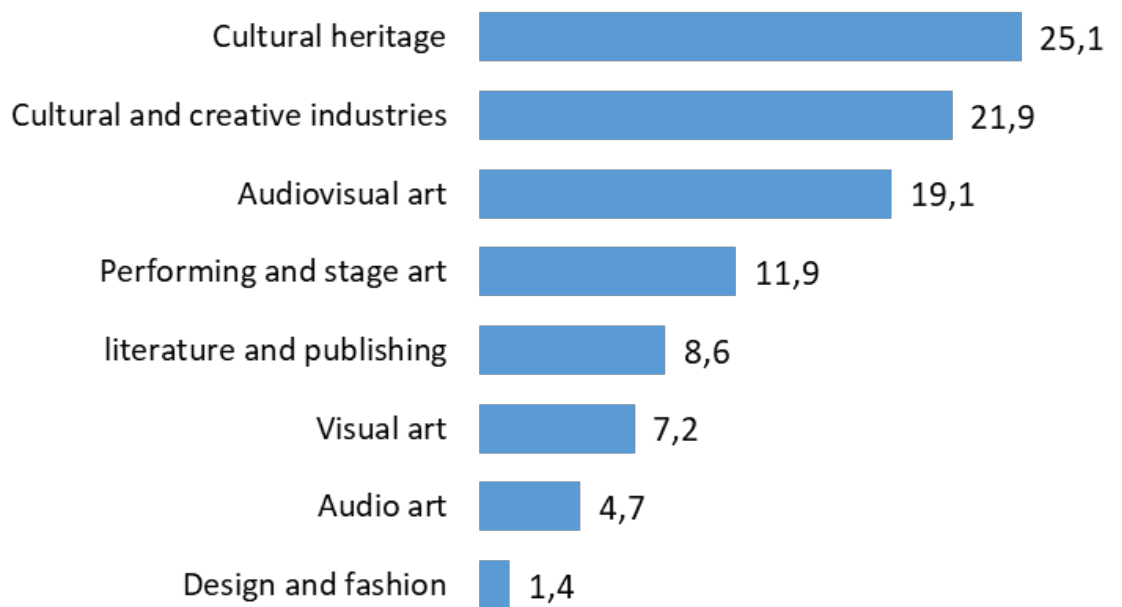


Diagram 27 - Creative industries sector, %, N=638

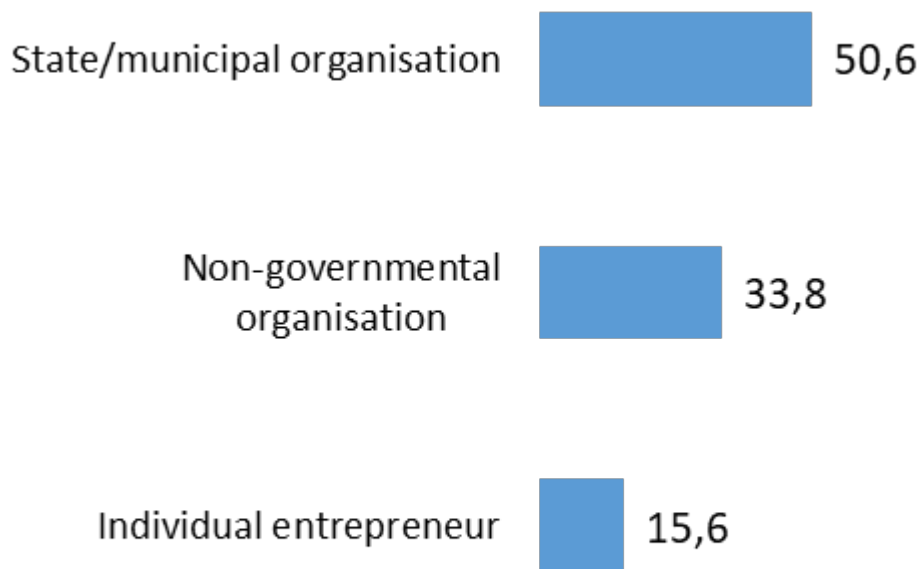


Diagram 28 - Organization and legal form, %, N=638

CONCLUSION

- More than half of respondents consider the current state of Ukrainian culture as good or acceptable. In addition to the war, respondents named the lack of financial support from the state and low salaries for cultural staff as traditional problems for the development of the cultural sector.

- About half of the respondents are generally optimistic about the current situation in their organizations. At the same time, slightly more than a third of respondents said that the situation is generally negative. Among non-governmental organizations and individual entrepreneurs, the level of negative opinions is higher. More than half of the respondents said that the situation in their organizations is difficult, which requires prioritizing support for this category of creative professionals.

- The key external factors that influenced respondents to continue working were their unchanged place of residence after February 24, as well as working for a state or municipal organization. Instead, the highest percentage of temporarily unemployed was among those who had moved abroad and/or were self-employed.

- The main measures for successful adaptation of organizations are cutting expenses, creating new products and services, and attracting additional sources of funding (grants, scholarships, etc.). The availability of a crisis plan and the use of state support opportunities have significantly increased the level of adaptability. At the same time, the lack of a crisis plan in about half of the organizations remains a problematic issue, which significantly reduces the ability to adapt in case of a deteriorating situation.

- According to the respondents, the main obstacles to the adaptation of organizations are the uncertainty of the overall situation in Ukraine and the lack of funding. The lack of finance demotivates respondents the most. The worst adaptation rate was recorded among individual entrepreneurs.

- The overall level of culture and the creative industries support is considered by the respondents as low. However, according to the respondents, the most significant support was provided by international organizations, volunteers, and NGOs. In contrast, business and the state, according to respondents, provided minimal support to the cultural sector. This assistance mostly concerned information support, salary compensation, and various educational opportunities. Respondents expected more support from the state and businesses, and the support that was provided was not very noticeable. Therefore, partnership projects involving businesses, government agencies, and NGOs may be promising areas for the future.

- While the respondents give relatively positive evaluations of the future of their organizations, expectations regarding the post-war recovery of Ukraine's cultural sector and creative industries are generally more positive. Over 80% of respondents expect a

gradual or rapid recovery of the cultural sector. At the same time, a significant group of cultural and creative workers (about 20%) is still uncertain about the future of their organizations, which indicates the need for all-round support to continue their professional activities.

- The absolute majority of respondents are ready to join in the restoration projects of Ukrainian culture. Various projects to restore Ukrainian culture can become a promising area for attracting highly motivated but less adapted cultural professionals, including individual entrepreneurs.

- According to the respondents, in the post-war reconstruction, the key support mechanisms should include grants for cultural and artistic activities, a state strategy for the reconstruction of the Ukrainian cultural sphere, and the promotion of Ukrainian culture abroad. At the same time, drawing attention to the problems with financing the cultural sector, a significant number of respondents noted the need to find additional funding sources for the sector. At the same time, there is a great demand for a separate program to restore the territories that have been destroyed.

To summarize the above-mentioned, we note that at the moment, the cultural and creative industries of Ukraine have generally adapted to the conditions of war and there is no critical situation in any of the cultural industries. However, there is now an urgent need to develop a strategy for restoring Ukrainian culture, involving a wide range of qualified professionals and additional sources of funding in the reconstruction process and the creation of new projects. On the one hand, this will allow cultural and creative professionals to apply their professional knowledge and skills to the post-war reconstruction of Ukrainian society, and help them find opportunities to support and expand their activities. The key measures of the recovery process should include grants for cultural and artistic activities, state support for the cultural sphere, and promotion of Ukrainian culture and art abroad.

